

## TRANSFER INTO IRISH LIFE COMPANY PENSION SCHEME



Before you give us your personal information it is important that you know what your data protection rights are and how and why we use your personal information. This is set out in the Irish Life Data Privacy Notice which is always available on our website at https://www.irishlife.ie or you can ask us for a copy.

Please read the Sections carefully before completing them and use BLOCK CAPITALS. If any section is blank or illegible, this may result in a delay in processing your request.

This form must be completed for transfers into an existing Irish Life company pension scheme

1. Financial Adviser Details																						
Financial Adviser Name																						
Financial Adviser Code							Τ															

Profile Number

## 2. Source of Transfer

Where is the transfer value coming from?

- a. A company pension scheme, including AVC scheme or self-administered scheme
   b. A Personal Retirement Bond (PRB) or Buy Out Bond (BOB)
- c. A Personal Retirement Savings Account (PRSA)
- d. A pension arrangement outside the State

value is from an overseas pension please contact Irish Life for specific requirements. Irish Life cannot accept transfers from the UK or from pension schemes which have UK tax-relieved contributions as our pensions are not registered as QROPS with HM Revenue & Customs

If the transfer

Please include a recent payslip or P60 as proof of salary

Questions (e) to (h) are to ensure your company pension benefits are within overall Revenue maximum limits

3.	Receiving	<b>Scheme</b>	and	Member	Details
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a. Existing Irish Life Company Pension Plan Number:

b. Name of existing pension scheme:

c. Member Name

- d. Date of Birth: (dd/mm/yyyy)
- e. Current Schedule E Salary €
- > f. Current value of other company pension and AVC schemes for this employment 

  €

## Pensions from other employments

h.	Current value of other pensions from other periods of employment and / or self-employment	€

If you need more space or if the member has retirement benefits they have already received or a defined benefit scheme please provide details in the text box below or on a separate sheet.

a. Name of transferring Life Office/trustees:  b. Name of transferring scheme (if applicable)  c. Transfer value amount:  d. Contact details:   5. Investment choice  Fund choice for transfer amount:  Current investment Choice:  Yes No  Or  Other fund (please state)  6. Member Declaration  • I wish to transfer the assets of my occupational pension / Buy Out Bond (or Personal Retirement Bond) / PRSA Plan to existing in shi Life company pension plan identified in Section 3 above and understand there are additional requirement needed for the transferring life office.  • I understand the investment date of the transfer in will be based on the date on which Irish Life receives all necessary requirements.  • I understand that the fire of an only be invested where the receiving scheme is Revenue approved, or for transfers fro an occupational pension / Buy Out Bond (or Personal Retirement Bond) that it meets all Revenue requirements and an application for approval has been submitted to Revenue for consideration.  • I understand that this Life Assurance plc (rish Life) is exquired to obtain any information it regards as relevant from the trustees or company, named above, in order for facilitate the transfer. I authorise the trustees or company, amend above, in order for facilitate the transfer. I authorise the trustees or company, amend above, in order for facilitate the transfer. I authorise the trustees or company to give Irish I ary relevant inclined making pension of supplied through any additional documents linked to this application form (or supplied through any additional documents linked to this application form for supplied through any additional documents linked to this application form for supplied through any additional documents linked to this application form for supplied through any additional documents linked to this application form for supplied through any additional documents linked to this application form for supplied through any additional documents linked to this application form for supplied throu			Office / S											
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